Evergreen Indiana
Frequently Asked Questions

Posted 4/29/2008

A.   Governance:

A.1.   What guarantee do we have that, should the program not succeed to develop mutually acceptable by-laws by the go-live date, records will be fully restored to the participating pilot libraries?

No Evergreen Indiana (EI) Library should move catalog records until its Board has reviewed and agreed to the governance documents that are yet to be developed by EI libraries.

Those Libraries that have volunteered to be in the first wave of pilot libraries', with proposed installations in 2008, will be developing the initial set of governance documents.

The AD HOC Committee that was named during the March 6 meeting of EI libraries will use the Pilot Libraries set of governance documents as a base upon which to draft a subsequent set that, hopefully, will meet the needs of an even larger group of EI libraries.

Recommendation for GOVERNANCE document: Each participating library should retain ownership of its current and future catalog records.

A.2.   Where can I send my ideas about what should be included in the governance documents for EI?

If you have ideas about the content of the governance documents as they are developed for Evergreen Indiana libraries, send your suggestions to Jacob Speer jspeer@library.in.gov

A.3.   Will libraries have multiple choices or a single choice about policies?

This is a matter to be determined by those working on the governance documents for EI.

A.4.   How was the committee that will determine the governance rules appointed?

Individuals representing all types and sizes or libraries were nominated at the March 6th meeting at the Plainfield Guildford Township Public Library.

A.5.   Will academic and public libraries share the same catalog?

It is possible that multiple types of libraries will share the same catalog or it is possible that there will be a public library catalog and academic library catalog. This is a matter to be determined by those working on the governance documents for EI.

A.6. If parallel catalogs exist, (academic and public) will there be parallel governance structures, etc.?

While it hasn't been determined that there will be parallel catalogs, if that occurs, it may make sense to have parallel governance structures and rules, etc.

A.7. Could we have restrictive policies so that our local resources do not get depleted?

Yes. This is a matter to be determined by those working on the governance documents for EI.

A.8. Will ISL have the master records?

The Evergreen Indiana consortium will control the master records.

A.9. There are only 7 representatives from small libraries.

Should there be a more equitable representation based on the number of libraries in each type of group or some other way?

It seems only reasonable that each member will have opportunities to make suggestions for changes and clarification once the documents are completed.

A.10. What is the Indiana Office of Technology role in this?

The Indiana State Office of Technology is not a participant in the Evergreen project. They have been consulted on some technical matters.

A.11. How does the Hussey-Mayfield Public Library in Zionsville implementation dovetail with governance structure?

Hussey Mayfield hopes to be a pilot member of the consortium in FY 2008 and will be subject to the same governance structure as all other participating libraries. Zionsville expects that there will be some compromises necessary for HMMPL to make; however, that Library's management and Board feels the long term political and financial benefits will far outweigh any potential inconveniences.

A.12. Is there a business plan?

This initiative is in the formative stages. By the Spring of 2009, there will be a comprehensive business plan.

B.   Cost/Fees:

B.1. What will the fee be for a library to join the EI consortium?

Zero dollars.

B.2.   What will the maintenance contract cost each library?

Zero dollars.

B.3.   What will Georgia charge Indiana libraries for a licensing fee?

Zero dollars.

B.4.   As we add records to the database is there a cost? Cost for adding into World Cat?

There is no cost to add records to the patron and catalog databases in EI. The State Library is reviewing the possibility of providing quarterly uploads of data into World Cat as an expense paid by the State Library.

B.5.   Should an analysis be completed to find out if EI would really save money?

In reviewing the Georgia model, we have found opportunities for significant savings by each participating library.

Responsibility/Cost Chart	Local EI Member Library	Indiana State Library	Equinox/Pines Georgia
EI Membership Fee	$0	$0	$0
Maintenance Contract	$0	100% paid by ISL	$0
Licensing Fee for Evergreen	$0	$0	$0
Adding Catalog and Patron Records to Data Base after Initial Load	Library	$0	$0
Uploads to World Cat	$0	100% paid by ISL	$0
High Speed Internet Access to EI Servers	$0	100% paid by ENA via agreement w/ISL	$0
Rent at Life Line Data Center, Indpls. for servers	$0	100% paid by ISL	$0
SIP Connections	$0	$0	$0

Responsibility/Cost Chart	Local EI Member Library	Indiana State Library	Equinox/Pines Georgia
Purchase of LAN hardware,			

server hardware & software + Maintenance	$0	100% paid by ISL	$0
Support Staff	$0	100% paid by ISL	$0
Code Contributions to Evergreen Contributions	In Kind Contributions	In Kind Contributions	In Kind
Attend Planning Meetings	In Kind Contributions	In Kind Contributions	$0
High Speed Internet Access to each EI Library	Pay for connection if not using filter	Currently 100% paid by ISL and e-rate *	$0
Workstations located @ EI Libraries + local set-up	Library	$0	$0
Barcodes for patron cards & collection materials @ EI Libraries	Library	$0	$0
Scanners located @ EI Libraries	Library	$0	$0
Self Check Stations @ EI Libraries	Library	$0	$0
RFID @ EI Libraries	Library	$0	$0
Subscription to OCLC MARC or other cataloging data from another source	Library for own use	ISL for own use	$0
Insurance on Equipment Owned by EI Library	Library	ISL for EI Equipment	$0
Training of EI Library Staff prior	Library to allow staff	Offered by ISL	$0
Project Management	Varies by Library	Offered by ISL	$0
Bib Record Preparation for Loading	Subsequent to FY08, Library may need to pay subject to the availability of grant funds	ISL will pay for Pilot Library Loading	$0
Patron Record Preparation for Loading	Subsequent to FY08, Library may need to pay subject to the availability of grant funds.	ISL will pay for Pilot Library Loading	$0
Deduping of Bar Codes	Library when applicable	ISL will pay for ISL records where applicable	$0
Verify compatibility of EI Library equipment, Internet connection speed and adding SIP connections	Varies by Library	Offered by ISL	$0
Update of Local Documentation	Library	ISL will pay for ISL Documentation only	$0
Back-ups and upgrades of EI hardware & software	$0	ISL	$0

C. Sustainability:

C.1. What is the level of accountability for participating libraries?

This is a matter to be determined by those working on the governance documents for EI.

C.2   What is the timeline for the EI project?

In order to accommodate some of the public libraries that need to resolve an immediate ILS issue within 2008, about 15 to 20 pilot libraries requested an invitation to go live with Evergreen in 2008. Libraries that are using the same proprietary ILS will go live on the same day. An unlimited number of libraries may be able to be added annually based on need and desire.

C.3.   How long will the Indiana State Library support the Evergreen project?

The State Library expects and is prepared to support the project for years as EI grows and matures.

C.4.   Will ISL have qualified staff for open source work?

ISL will hire qualified staff. In addition, the staff at ISL will have support from the original developers at Equinox in Atlanta, GA as well as from those knowledgeable IT folks who work in Indiana's libraries.

C.5.   What is the continuity plan and the plan for developing a knowledge base for ISL tech staff for infrastructure setup, etc?   I have a concern with the "next group" of tech people coming in and thinking that tools currently in use aren't the best, making changes, etc. and where does that take the project?

EI will be a consortium based organization and a majority of the members would need to agree for this to happen. As far as Evergreen USA/Canada, all development accepted into Evergreen will be rolled back into the source code and potentially available for all libraries across the U.S. and Canada to use.

This means that features can be developed by any single library involved in the Evergreen open source project in the US and Canada. Such additions then could ultimately be used by all other libraries.

The governance unit of Evergreen Indiana most likely will exercise the final word as to what features will be turned on and off for Indiana's libraries. These choices can always change as the system matures among Indiana's libraries.

C.6.   Will federal & state dollars be supporting Evergreen? If so will their dollars continue? How can we be sure money will always be there?

The State Library is committed to the success of Evergreen Indiana. Due to the success of Evergreen in Georgia, the Georgia State Library has received additional funding from the Georgia General Assembly to use toward the development of enhancements and expanded services. If Evergreen Indiana is as successful as expected, we would work toward the same goal.

C.7.   Will the State Library have to fight for money each year for the project?

No, the State Library expects to use a combination of State and federal resources to fund Evergreen and does not expect there to be funding shortages in the foreseeable future.

D.   Georgia PINES:

D.1.   How tied is Indiana's project to Georgia's?

It is not the intention of Evergreen Indiana to develop a separate version of the underlying software but instead to help develop enhancements that can be turned on or off depending on the governance of the individual user groups in EI.

D.2.   Are we taking Georgia's system and plopping it down in Indiana?

No, we are installing the Evergreen ILS system for Indiana but the Indiana Evergreen consortium will control how it is configured. It maybe configured in a similar fashion as Georgia or differently. Evergreen is a tool. How it is used in Indiana is up to Evergreen Indiana libraries.

D.3.   Where can I see and review the Evergreen Georgia governance documents?

Go to http://www.in.gov/library/5592.htm. There you will find the following documents under the heading: "Georgia Evergreen Resources".

- Evergreen Bylaws
- Code of Ethics
- Intent Agreement
- Membership Agreement
- Mission and Goals

D.4.   How many Library Systems in Georgia are now members of Pines?

There are 58 Library Systems in Georgia. There are no un-served citizens in that state. Of the 58 systems in Georgia, 48 are using Evergreen as their ILS. These 48 serve 53.4% of the State's total population. There are 246 Library facilities being served, including 48 central libraries, 175 branches and 23 service outlets.

The low/high range of population being served by these 48 systems is 15,881 to 353,535. The low/high range of the number of facilities in each system is 1 to 15. There are between 15 and 20 bookmobile outlets included.

Among the public libraries in Georgia that are not using Evergreen, the range of population is 89,153 to 786,727. In addition, the number of service outlets in each system in this group range from 2 to 34.

D.5.   Which Public Library Systems in Georgia are not participating in Pines as of March 2008?

Ten systems are not now participating. These include:
- Atlanta-Fulton Public Library System
- Bartow County Library System
- Chattahoochee Valley Regional Library System
- Cobb County Public Library System
- DeKalb County Public Library System
- Forsyth County Public Library System
- Gwinnett County Public Library System
- Live Oak Public Library System
- Northwest Georgia Regional Library System
- Sequoyah Regional Library System

There is an expectation that some of these on this list such as Atlanta-Fulton County and Chattahoochee Valley will join upon the introduction of the acquisitions and serials modules.

D.6.   Does Georgia have any other type of library participating in Evergreen other than public?

The Evergreen consortium in Georgia includes only public libraries. There are academic libraries and special libraries that use Evergreen outside of Georgia.

D.7.   How many library cards does Georgia have and are there any un-served areas in the state?

Library patrons who live in a Pines Library District have only a Pines card and Georgia has no un-served areas in that state. Library patrons who live in a non-Pines Library District have the option of holding 2 cards, 1) local library district and 2) Pines card even if the home library is not yet an Evergreen participant. There is no need in that state for nonresident or temporary resident cards, etc.

D.8.   Did the idea for a Statewide Card in Georgia come from the Governor?

Yes, the concept of a single library card for residents' use in Georgia was initiated by the Governor that was in office during the late 1990's.

D.9.   How is Georgia's statewide library card done?

The Hennen's Website has a good description:

"The state of Georgia has embarked on an ambitious statewide library card project. Starting as a Y2K remediation effort last year [1999], 98 libraries installed a shared SIRSI system, merging their holdings into one database, and issuing one PINES (Public Information Network for Electronic Services) library card which is honored by all participating PINES libraries. All Georgia citizens are eligible for a free PINES card, even if their home library is not yet a participant. The vision is for all Georgia libraries to eventually join the project, when funding is available. The first round was funded by the state, including all hardware, T-1 lines, networking, software, training, rebarcoding. - everything! The contract was awarded to SIRSI on April 12, 1999, and all libraries were operational by Dec. 15, 1999."

D.10.   Please name some features of Evergreen that Georgia libraries do not like.

According to Georgia Pine staff members reports are a 'dislike'. Georgia Pines staff adds the disclaimer that no one liked reports in their old vendor system either.

According to staff members at the Athens Public Library, reports are more than adequate and quite detailed.

Georgia Pines member libraries are perpetually clamoring for faster changes and upgrades to Evergreen. With the introduction of Evergreen to libraries outside of Georgia, the upgrades will probably come faster since there will be more library programmers available to help.

E.   Involvement in Evergreen Indiana

E.1.   If a library doesn't join now will it ever have a chance to join or participate in the governance structure?

The short answer is 'yes'; the long answer is: The basic governance structure will be developed by those who choose to participate. There will be opportunities for libraries to join in the future and the governance structure will be modified from time to time as needs change.

E.2.   Will EI really help the patron?

Yes, we suggest you contact one of the 48 Library systems in Georgia that is participating and ask this question. When the Indiana delegation visited Georgia in January, the Athens Public Library staff were quite pleased with their use of Evergreen and they also felt that the patrons were enthusiastically supportive of the changes brought about through their use of Evergreen.

E.3. How do you see Evergreen Indiana helping local public libraries serve patrons more effectively?

- Libraries will be able to provide a link to what can become a union list of holdings located in Indiana's libraries.
- Libraries will have access to a union list of patrons.
- For libraries without an online catalog, this is an opportunity to be able to offer one.
- Save significant dollars that are presently being spent on proprietary ILS's to use in building better library collections.
- Have some control over how the ILS serves your particular needs.

E.4. Will ISL help libraries that already have an ILS with the cost of conversion, not just those who have never had an ILS?

Yes.

E.5. What are the unique challenges that a library or institution would need to address before becoming a part of Evergreen Indiana?

- An examination of the resources that would need to be dedicated by a library to join the consortium and implement EI locally.
- An examination of the potential current and future cost factors.
- Board approval
- Selling the concept to the local library staff.
- Training of staff and making sure that they understand the benefits of EI for their library district patrons and the entire state.
- Patron education and helping them understand why EI is a better system for them and all Hoosiers.
- Cataloging according to a preset standard that would be set by the consortium's governance. • The manner in which libraries are engaged in resource sharing may change. The patrons will have the opportunity to serve themselves.
- An opportunity for all libraries to their holdings with each other.

E.6. INCOLSA is working with the shared catalog and moving to Koha. Where does this leave the libraries that participate in the shared catalog?

Each of the participating 30 Libraries will need to answer this question independently based on the information that they have.

Evergreen Indiana potentially can include all public, school, academic and special libraries in Indiana. This could take a few years, but the invitation is there for all to join.

E.7.   Who are the Indiana Libraries in the pilot project?

Approximately 15 libraries have expressed interest in participating as pilot libraries in 2008. The list of the libraries and additional information will be released soon. This group will be the 2008–2009 pilot group.

E.8.   Will the State Library use the Evergreen Indiana ILS?

Yes.

E.9.   What is the real need among PALNI members?

This question will need to be answered by PALNI members.

E.10   What are some of the positives about Evergreen?

- Resource sharing
- Enhanced opportunities for customers
- Collaborative in nature
- Cost effective
- Expandability and Scalability
- Ability to get under the hood and make changes to the software without paying for the changes.
- Changes are only limited by 2 things: Governance and Skill of Programmers rather than money and leverage

This project may eventually lead to customers making demands of the lawmakers to give Libraries more support.

E.11.   A large library feels like every library must join Evergreen even if they don't want to.

No one is required to join the Evergreen consortium. The Evergreen Indiana Libraries have agreed as of March 6, 2008 to do the following:

- "Declared interest individually in being a part of the initial discovery among Indiana's libraries of how open source ILS might be of value to you."
- No library made a monetary commitment only an investment of staff time to learn more.
- "Further that you may withdraw your letter of interest at any time."

The State Library and Hussey-Mayfield were aggressively encouraging as many libraries as possible to submit a letter of interest. We needed a rich variety of perspectives to shape the future of Evergreen Indiana.

E.12. Patrons don't understand library districts & different rules – I would like an easier way and this is an easier way.

Yes, it certainly can be if planned and implemented with this thought in mind.

E.13. How do you think resource sharing might change among Indiana libraries if Evergreen Indiana were to become a reality state-wide?

Indiana libraries have a rich history of resource sharing. A state-wide program like EI, would likely mean more involvement from libraries of all sizes and types. Libraries that did not previously have an automation system could be active resource sharing participants.

EI brings to light many new ways to share resources that were never available before. Sharing technical support, acquisitions and cataloging abilities are examples of how resource sharing has changed with Georgia's Evergreen project. We have a wonderful opportunity to go even further than Georgia and do more that was ever possible in the past.

F. Transition from Current ILS to Evergreen Indiana:

F.1. Will EI use a large public library's master records? If so which library?

Pines in Georgia is willing to allow us to use their master records until an Indiana library steps forward that is willing to loan their records.

F.2. Will the current ILS proprietary vendors now serving Indiana's libraries try to make it difficult to change or try to make it expensive to change to Evergreen?

Review your contract to see if there might be any stumbling blocks for you to terminate your relationship with your present ILS provider. It is not expected that there would be more problems than if you were changing from one proprietary vendor to another.

F.3. Will our current ILS vendor think that our data that is currently in their system belongs to them rather than to the library?

Review your contract with your proprietary vendor.

F.4. Can vendors treat us differently if we were to choose to migrate to EI rather than to another proprietary vendor?

Review your contract with your proprietary vendor. They may try to intimidate libraries but legally they can do no more than is included in your present contract. Balance the information that you may receive from proprietary vendors with information from your colleagues working in other Indiana libraries who have accumulated much knowledge about how Evergreen works. The proprietary vendors may be less than supportive of this initiative.

F.5.   If vendors should want to charge significant dollars to convert each libraries data in Indiana, is there expertise within Indiana to convert the data circumventing the large price tag?

That is the goal. We will start with help from Equinox in converting and configuring catalog data but Indiana will eventually grow into being able to be self sufficient in doing these conversions ourselves.

G.   Technical Requirements:

G.1.   What are the system requirements and hardware needed to run the staff client and the server?

Equinox, the Evergreen developers in Georgia say, "a 2.0 GHz processor, 1 GB RAM, and Windows XP. (Vista hasn't been fully tested yet.) I have seen it run on older systems." If the older systems owned by Indiana's libraries can run Windows XP, these systems will also run the staff and OPAC clients but the Windows XP system may be slower than desirable unless the system has lots of RAM.

G.2.   Is it a requirement that each EI Library use ENA as its internet provider?   Does each participating EI Library need to have Internet access? What   speed of Internet access will be required?

EI libraries do not need to use the same provider for their Internet access. ENA works as well as any other provider. Each participating library will need to have Internet access in its building[s] to be able to use Evergreen.

Internet connection speed to Evergreen depends on how much Internet traffic the local library experiences. If the library's customers are heavy viewers of streaming video, then the OPAC and client stations may be slow to load. However, a library can minimize speed reduction by using a firewall\router that will maintain QOS (quality of service). Introduction of QOS into a local library system will give the OPAC and staff client traffic priority over other traffic like YouTube.

A 56k dial-up connection is NOT recommended for Evergreen.

G.3.   What will ENA's role be?

ENA has offered to provide high speed internet access to the EI servers at no cost.

G.4.   We use receipt printers at each circulation desk. What brand of receipt printer will work with Evergreen?

Evergreen will work with all popular receipt printers. For any printer that can load into Windows, chances are good that it will work with the Evergreen ILS.

G.5.   What about backups?

Due to the way that the hardware architecture is configured at the Evergreen host site, no data should be lost because there are multiple redundancies built into the architecture of the system. The data will be backed up daily with snapshot database backups as well as transaction log backups.

G.6.   Will off site back up (aside from Life Line Data Center in downtown Indianapolis) be provided?

There is a plan to carry backups off site and discussion of a secondary location but nothing has been finalized yet.

G.7.   Will the State Library maintain the server hardware?

Yes.

G.8.   What is the plan for replacing hardware?

The unique feature about virtualization is that you do not have to have the exact same hardware to provide core server availability. This will make the rotation of hardware for replacement much easier. There is not an exact plan in place at this time. The governance of Evergreen Indiana will have an opportunity to make recommendations to the State Library for this plan in the future.

G.9.   Is the hardware being built now or only if the consortium goes forward?

The State Library has committed to investing the cost of the initial hardware installation in order to test the concept through libraries around Indiana.

The hardware will be built in a phased plan. The minimum core of initial hardware that will be needed for initial launching is being purchased and installed. Later a second phase will be implemented when more libraries go live with Evergreen Indiana. In phase 3 of equipment development, the hardware will be powerful enough to carry all libraries located in Indiana.

G.10. Who will write code?

Development will go through the Evergreen open source project and will be subject to acceptance of Equinox, the original developers. All Equinox open source project members will be able to develop for the Evergreen project but such development will be subject to acceptance by the Evergreen project members. Code written by staff at Hussey-Mayfield Memorial Public Library has already been accepted by Evergreen. This code is for credit card use.

The decision on configuration will ultimately fall on the governance committee but the ISL, Equinox and possibly select staff from member libraries will be involved in the actual configuration.

The State Library will fund the staff positions that will be in charge of the tier layer control/change control system. This is a matter to be determined by those working on the governance documents for EI.

G.11. Will "on call" technical support be available?

The State Library plans to offer a support desk that mirrors the hours that libraries are open and offer on call support for major disruptions.

G.12. Databases: The by-laws must address how patrons of a specific library will be able to continue to access the unique subscriptions made available by the purchasing institution without violating the existing contractual terms of use based on patron-count. What guarantees that only "local" patrons will be able to access them? Or will the ISL be negotiating state-wide contracts for all participating libraries for all locally demanded databases?

Third party databases may be hooked onto the individual library's ILS as long as that database is SIP complaint. [*Session Initiation Protocol*.] Such an arrangement will in no way affect other EI libraries. EI libraries will not be obligated to all use the same databases.

Briefly, the way this will work: For instance, an EI Library purchases World Book Online. This EI Library pays for its own subscription. Then World Book Online will be hooked via the SIP client, unless some other method of authentication is used outside of Evergreen, to the individual Library's ILS, in this example, Evergreen Indiana. Only this single Library's customers may access the subscription to World Book Online. When the SIP client is used, this software will authenticate the Library's unique customers through the Evergreen SIP client. The World Book Online will be run on the hardware at the individual Library site or via a host server offered by the World Book Online publisher.

SIP connections, regardless of the number, in Evergreen will cost the Library NOTHING. Most proprietary ILS companies do charge for SIP connections.

G.13. Could we build in online reference?

Yes, additional applications can be linked to or from Evergreen Indiana.

G.14. Rapid development will change the open source – SIRSI was once exciting but then "ossified." Will Evergreen do the same?

Possibly, but it would be better to be involved at the dynamic end of a product rather than at its termination. In addition, with Open Source, the libraries in Indiana will have direct input into the ongoing development of the product. Call some of the Pines libraries to see if this has happened yet in Georgia.

H.   Acquisition and Bar-coding:

H.1. Will the patrons be able to see items that each library has on order?

The acquisitions module is under development by Equinox in Georgia. Send your wish list to Jacob Speer (jspeer@library.in.gov) at the State Library so your product preferences will be addressed in the development of this module.

H.2. Can Evergreen handle multiple vendors?

The Evergreen developers at Equinox said, "Absolutely. Each vendor will have its own profile with default currency, billing info, etc. and they can be configured at different levels of the organizational hierarchy. For example, you can have branch and system-level vendors."

H.3. Does Evergreen only work with one type of barcode? Do we know what type of barcode that will be?

The issue is not that Evergreen only works with one type of barcode. Rather the issue relates to duplicate barcodes that are simultaneously being used by more than one EI Library for different items or patron identification.

For instance if EI Library #1 has a 16 digit barcode 0123456789123456 that they are using for a music video and EI Library #2 is using the exact same barcode number for a Charles Dickens novel, and yet a third EI Library uses the exact same bar-code digits to identify an encyclopedia, two of the three EI libraries must change the barcode for that item so no duplicate bar codes remain in the EI system.

The same logic will apply to patron records. If more than one EI library uses the exact same digits to identify customers, one or more of the libraries, depending on how many are affected, will need to change the affected barcodes from the current to an EI unique number.

**H.4.	Will member libraries be required to re-barcode their library holdings?**

No, only items found to be duplicates within the existing EI libraries will need to be re-bar-coded. The Evergreen developers stated that if they were to start over bringing the Georgia libraries up onto Evergreen from scratch like Indiana is doing, they would recommend that all Indiana libraries re-barcode their collections and customer records (cards). The Equinox folks thought that you could use a barcode design with zip codes as the prefix or some other standardized way of adding unique library location prefixes to the barcodes.

Upon further in-depth questioning of the Evergreen developers, it has been discovered that each barcode affixed to each item owned by the libraries collectively in the consortium must be unique as an identifier. Further if barcode checking were turned off, it would be possible for EI libraries to have multiple length barcodes with alpha and/or numeric characters.

The system would accept the barcode as long as each holding has a unique barcode number or RFID tag, (Yes, RFID works the same way) in Evergreen. The challenge with this is that the first libraries added into the EI system would be able to use their barcodes as is. Then if it was found at a later time when another library coming into the system had the same barcodes or partial barcodes, then the library joining later would have to re-barcode any affected items.

This would save some time and expense up front but would cost some libraries extra time later. The EI libraries would have to check the barcode on the screen manually as the barcode checking device would be turned off. [*See above.*]

**H.5.	Would it be better to use RFID rather than re-barcode an entire collection**

The answer would be determined via an analysis of cost and benefit for the library. Evergreen is able to use both as long as each item has a unique identifier in the database.

**H.6.	Can Evergreen Indiana be used to inventory items in a library?**

Evergreen may be used as a tool to print reports and have your staff check the shelves for the items on the list of holdings against what items are actually on the shelves in the library. Evergreen will also allow you see in the catalog what should be on the shelf on either side of each item that your library owns.

Beyond that, Evergreen will serve you like any other ILS in conducting inventory. There is an exception to this statement for those libraries that have installed RFID. In those libraries equipped with RFID, you will have the ability to transact a physical inventory.

H.7.   Does Evergreen allow for local branding?

It is possible to have branding on the OPAC as well as affixed to items in the collection. The type of branding used by EI will be a matter that will be determined by those working on the governance documents.

I.   Cataloging:

I.1.   Will the Evergreen software be compatible with both the Library of Congress & Dewey classification systems?

For classifications, the cataloging module allows any value from the MARC (or not in the MARC, for local schemes or local alternate values) to be used for the call number. Call numbers are brows able today, though an A-Z type interface is still pending. There could be one for each scheme in use, but, as you can imagine, separating them could get confusing for the patron, who mostly wouldn't know about such things.

I.2.   How library specific can resources that are cataloged be?

This is a matter that will be proposed by those working on the governance documents for EI.

I.3.   In the beginning are libraries going to add only their holdings that they have?   Will we add missing items or wait until they are found? What about those items that are overdue? Currently we have items checked out in 2000 still in our catalogs attached to the patron record. Would we put these in? Just put in overdue items for the current year?

Your records would be entered in the format that they now exist on your present ILS. All of your holdings would be loaded into the EI data base.

I.4.   What about Authority Control?

A desirable goal of the Evergreen consortium might be to have the "cleanest and best records" available for use by member libraries and Indiana residents. This is yet another matter that will need to be determined by those working on the governance documents for EI.

I.5.   Can authority control be out sourced?

This is a matter that will be proposed by those working on the governance documents for EI.

I.6.   Will there be issues cataloging serials and some school libraries use Sears subject headings? Will this be a problem?

Anything in the MARC is supported as far as indexing is concerned (obviously). As the authority cross-linking matures, validation of headings that don't have an authority record or even an authority scheme will become smarter, but the worst case is that the MARC editor will display a heading as non-authorized when there's no authority scheme for the heading type. This is a display-only thing, and does not affect the data in the record.

I.7.   How often will uploading occur? (uploading to what?) In Georgia uploading occurs quarterly.

This is a matter to be determined by those   working on the governance documents for EI.

I.8   Will EI libraries share the cost of purchasing MARC records? Who will buy MARC records?

This is a matter that will be proposed by those working on the   governance documents for EI.

I.9.   Will the State Library continue to support WorldCat?

Yes.

I.10.   We would be in violation of our agreement with OCLC if we allowed others to use our MARC records.

There seems to be strong impressions among some Indiana libraries that in their agreement with OCLC, they individually are not allowed to share bibliographic records with other libraries.

In our research, we have found such an agreement was in place at an earlier time, but is no longer current.

The primary restriction in place now relates to "selling" bibliographic records secured from OCLC to others. Evergreen Indiana will not be selling any individual library's OCLC records to any other library. Hence, sharing OCLC records is well within the outline of the current contract documents with OCLC. See clarification from Doug Potts at OCLC below.

Contracts that individual Indiana libraries have with OCLC reference the following document: "Guidelines for the Use and Transfer of OCLC-Derived Records". The web link to this document is http://www.oclc.org/support/documentation/worldcat/records/guidelines/default.htm.

In particular review Guideline #1 on page 1. Then for background of these OCLC Guidelines, see page 2, "About the Guidelines: Background".

The following is the text of an email message from Doug Potts at OCLC received by the Director of ISL on March 19, 2008: I want to provide some guidance on the use of OCLC-derived records. The current guidelines allow an OCLC member library to transfer the records of its own holdings to another library, but not to a commercial organization. The guidelines include transfers to non commercial state agencies, so long as there is an understanding between OCLC and the agency, which largely includes agreement with the OCLC guidelines for the use and transfer of OCLC records. You can view the current guidelines here: http://www.oclc.org/support/documentation/worldcat/records/guidelines/default.htm

I.11. Will OCLC allow use of their records?

According to Doug Potts at OCLC and the OCLC website: http://www.oclc.org/support/documentation/worldcat/records/guidelines/default.htm each member and nonmember library may use records without restriction, and may transfer records of its own holdings without restriction to other libraries. In addition to transfers to libraries, each member and nonmember library may transfer records of its own holdings without restriction, to (a) member networks, (b) state and multi-state library agencies and (c) all other noncommercial firms.

J.   Circulation:

J.1.   Can EI accommodate various fine policies?

Yes. This is a matter that will be proposed by those working on the governance documents for EI.

J.2.   How much control will individual libraries have over their lending of special collections, like realia (e.g. arrowhead collections)?

As in Georgia, special collections like reference material can be exempt from circulation. This is a matter that will be proposed by those working on the governance documents for EI.

J.3.   It was stated at the EI meeting on March 6 in Plainfield that the server could be down, but we at our remote site could continue checking in and out. Is this correct?

Yes. The Evergreen client has a stand alone station that would start if a connection to the server could not be reached. It would allow a library to continue to circ items and make new cards until the Evergreen system is back up. Then it would connect and upload all of the data it missed during the down time.

It is our understanding this is also how a library would equip a bookmobile or a remote site that did not have an Internet connection. Transactions may be downloaded

to a disk; subsequently the disk would be taken to a workstation where the information stored on the disk would be uploaded.

J.4.   Can patrons put holds on items?

Yes.

J.5.   How long can a library designate new books as not eligible for placing holds by patrons from outside their library district?

This is a matter that will be proposed by those working on the governance documents for EI. Georgia restricts access to new books for six months.

J.6.   As materials are interlibrary loaned or as materials are returned to different libraries, will the participating library that last has the item keep it?

No.

J.7.   Is reserve circulation an option?

Yes.

J.8.   How flexible are the circulation parameters?

The software has been designed with a great deal of flexibility. This is a matter to be determined by those working on the governance documents for EI.

J.9.   At the meeting it was stated that Georgia patrons could not get new—best sellers from another library. New items stayed with the home library. Could they request audio visual material?

This is a matter that will be proposed by those working on the governance documents for EI. 19

K.   Interlibrary Loan:

K.1.   Will an individual patron who is not physically in an Evergreen Indiana (EI) Library be allowed to do their own ILL without the patron's home library being involved?

This is a matter that will be proposed by those working on the governance documents for EI.

If the customer is a cardholder of a participating member of the Evergreen Indiana consortium, the ability is available in the current Evergreen software that it could be configured this way.

K.2.   How will ILL work better? How would libraries like for ILL to work better?

EI is very flexible and allows for users to identify problems with ILL and apply changes to the system.

K.3.   With many libraries looking at budget cuts, some large libraries think that other libraries will abuse the use of the collections of large libraries through ILL.

It seems inconsistent that Indiana libraries would allow this to happen. Why not study our current system to see where the present system in Indiana is and is not working for Indiana libraries of all sizes and styles?

It seems that this would be a place where data needs to be collected and evaluated. Also, the system could have alarms installed where, for instance, no more than a predetermined number of requests would be handled in a fiscal year by any single lending library.

The system could route the requests in a fair and equitable manner around the state rather than calling on the same libraries repeatedly. In Georgia they have found that the circulation numbers are very even due to the small public libraries sometimes having a larger collection of older titles.

K.4.   How much added ILL work and staff time will be required to process returns to home libraries of items borrowed by local patrons and those returned by local patrons who borrowed from another library?

It's an unknown variable. We know that Georgia saw about a 50% increase in ILL delivery traffic from PINES libraries after the implementation of Evergreen.

K.5.   Will INfo Express expand?

INfo Express will add additional routes and stops as necessary.

L.   Patron Records:

L.1. **Will Statewide cards assist libraries with lending practices to good / bad customers (able to better check for bad customers with shared patron database)?**

You will easily be able to sort out the good from the bad customers but each library will have to spend the time to check patron records so that these patrons who have violated some polices will be identifiable.

L.2. **When we enter patron information, do we enter just our library patrons? What about reciprocals when the other library is not a part of Evergreen?**

This is a matter that will be proposed by those working on the governance documents for EI.

L.3. **Our library has made patrons as computer users only. They do not check out material – they just come and use our computer—they may be in our taxing district or they may be in the un-served area. Can we still do this? We do not collect information on them just their name after we see an ID and go over the computer rules.**

The ability exists in Evergreen to add customers who have the ability to use computers at Libraries that filter. The system can also accommodate various levels of internet filtering through a SIP [Session Initiation Protocol] connection. This is a matter that will be proposed by those working on the governance documents for EI.

L.4. **If a customer owed for lost or damaged material or a fine, would the customer be stopped from receiving material from all the EI libraries? Would all participants have to agree on the same threshold? Will it stop patrons from renewing material that is on hold?**

EI could be set to block a patron from using other libraries if they had outstanding fees. This is a matter that will be proposed by those working on the governance documents for EI.

L.5. **How private is the patron's record? Can any library see any patrons' complete record?**

As it stands in Evergreen if you have privileges to see customer records at one library, you can see customer records from any library. The EI consortium should adopt stiff penalties for abuse of this privilege. It comes down to trust of each other. Review the "Code of Ethics" document at http://www.in.gov/library/5592.htm under Georgia Evergreen Documents.

L.6. **Will a record be kept on what patrons have checked out and returned?**

In Georgia, the last 4 – 5 customers that checked out an item are retained in the system. The transaction logs are retained in Evergreen-Georgia for about 2 weeks in case a restore needs to be done to the database. How long a customer's checkout history is retained in the system will be determined and set out in the EI governance documents.

L.7.   What level of access will Georgia have to Indiana data?

Georgia will have no ownership or claim to any of Indiana's data or project. They would not have access to the data unless it was granted to them.

L.8.   Because the Evergreen software allows for storage of patron history and book bags won't this cause privacy issues?

The length of time customer histories are saved will be dealt with in the governance piece of this initiative. When a customer keeps their book bag private then it is for their eyes only. If the customer makes their bag public then the information would be accessible by anyone, however, this decision would be up to the customer and not to the library. Book bag security will be another governance issue.

L.9.   What information will be displayed for patron record profiles?

This is a matter that will be proposed by those working on the governance documents for EI.

L.10.   We keep track of replacement cards as we have a sliding fee—first one $.50, 2nd $1.00 and 3rd is $3.00. Will we be able to do these notes? If a young person is visiting their grandmother and shows us their library card to use the computer will it tell us that his parents allow his/her to go on-line?

Yes there is a notes section in Evergreen that may be used for this purpose.

M) Miscellaneous:

M.1.   How might any future action by the State Legislature such as consolidation of individual libraries affect Evergreen?
It's not possible to predict the actions of the legislature. We do not anticipate any impact on the Evergreen project if any action is taken on consolidation by a future legislature.

M.2.   Will the Public Library Access Card (PLAC) program continue?

The Public Library Access Card program will continue but the program may change or be phased out depending on the success of Evergreen Indiana.

M.3. Is a single card for all borrowers possible?

In an ideal world it would be good but given Reciprocal Borrowing and PLAC probably would not work the way things are now. Changes are not always bad. {"Improvements," by definition, are not bad.} Maybe it is time for our present system to be evaluated in light of technology that has been developed since the present system was initiated and new data is available.

M.4. Twenty-one years ago our library tried a similar project and it didn't work then and won't work now.

The Evergreen ILS is working for 48 public library systems in Georgia and more importantly for their customers. The Evergreen ILS has been in place since 2004.

M.5. How do I convince my boards to participate in this program?

Boards like to hear the facts. If a case with solid data can be developed around use of the Evergreen ILS that is what we would be obligated to present to our individual boards, positive or negative.

M.6. How do you feel about all libraries that use Evergreen Indiana offering a single card for all borrowers?

This is an idea worthy of investigation and trial.

M.7. Don't we want a statewide online catalog system?

There has certainly been much discussion about this for many years among Indiana's libraries and there would be significant benefits to a statewide catalog.